

Modify existing or incorrect Costing Allocations on SPMS employees:

This is what should show on SPMS employees Costing Allocation Tab

The screenshot shows the 'Costing Allocations' tab with a table of current and future allocations. Three callout boxes highlight specific fields:

- Position Restrictions: PIN/Position & Employee Info** points to the 'Position Restrictions' column.
- Distribution Percent: 100%** points to the 'Distribution Percent' column.
- Costing Allocation Level: POSITION RESTRICTIONS** points to the 'Costing Allocation Level' column.

Start Date	End Date	Costing Allocation Level	Position Restrictions	Costing	Distribution Percent
01/01/1900		Position Restrictions	075080 HR Analyst III DBM - ASHLEY LOVETT (W2015504)	Fund: 01 General	100.00%

If there is an incorrect Costing Allocation, it needs to be removed.

To Remove a Costing Allocation:

1. Locate employee in search field
2. Go to employee profile > Pay Tab > Costing Allocations

Depending on how the information currently appears, follow the respective steps.

Example 1:

Start Date	End Date	Costing Allocation Level	Position	Costing	Distribution Percent
05/23/2017		Worker Position	063203 HR Analyst IV DBM - Amy Angst (W1088673)	Fund: 01 General	100.00%

3. Click the **Maintain** Button

The screenshot shows the 'Pay' tab of an employee profile. The 'Costing Allocations' sub-tab is active. A yellow circle highlights the 'Maintain' button, which is used to manage the existing costing allocations.

Start Date	End Date	Costing Allocation Level	Position Restrictions
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4. The *worker* field will auto-populate, select the employee's *position* and enter that field. Click OK.

Worker Costing

Worker X Amy Angst (W1088673)

Position X 063203 HR Analyst IV DBM - Amy Angst (W1088673)

Earning

5. Click the "Remove" button to completely delete this section. Click Submit.

6. Select "Done" to return to the Costing Allocation Tab

Example 2:

Start Date	End Date	Costing Allocation Level	Costing	Distribution Percent
05/23/2017		Worker 	Fund: 01 General	100.00%

3. Click the **Maintain Button**

Job Contact Personal Compensation Pay Perform

Pay Group Results Input Costing Allocations

Maintain

Current and Future Costing Allocations 1 item

Start Date	End Date	Costing Allocation Level	Position Restrictions
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4. The *worker* field will auto-populate. **Do not fill in the position field.** Click OK.

Worker Costing

Worker X Amy Angst (W1088673)

Position

Earning

5. Click the "Remove" button to completely delete this section. Click Submit.

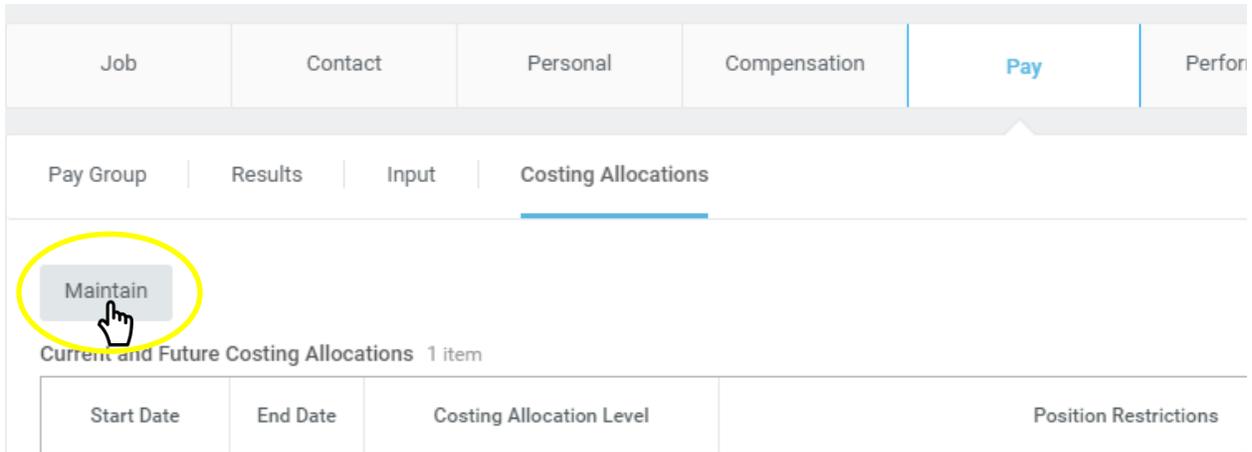
6. Select "Done" to return to the Costing Allocation Tab

7. Follow the **Add Costing Allocation on SPMS Employee** Job Aid to add the correct Costing Allocation information

How to Add Costing Allocations on SPMS employees:

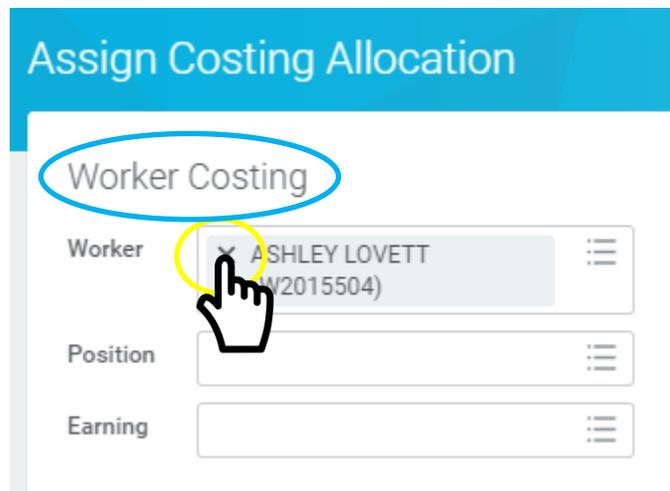
To Add Costing Allocation:

1. Locate employee in search field
2. Go to employee profile > Pay Tab > Costing Allocations
3. Click the **Maintain Button**



** If you do not see this button, you do not have security to change this information**

4. Click the X to **remove the auto filled employee information**



5. In the **Position Restriction** field, find the employee by name or PIN and press OK

Position Restrictions Costing

Effective Date * 05 / 12 / 2017 

Position Restrictions * 

6. Enter Fund Code information in the **Worktags** field

Costing Allocation Attachments

1 item 

	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Worktags	*Distribution Percent
 				<input type="text" value="Fund: 01 General"/>	<input type="text" value="100"/>
					100.00%



You can have more than one Fund Code, but the Distribution Percent must equal 100%

7. Submit the new/updated information, then navigate back to the Costing Allocation tab and confirm that it now shows correctly